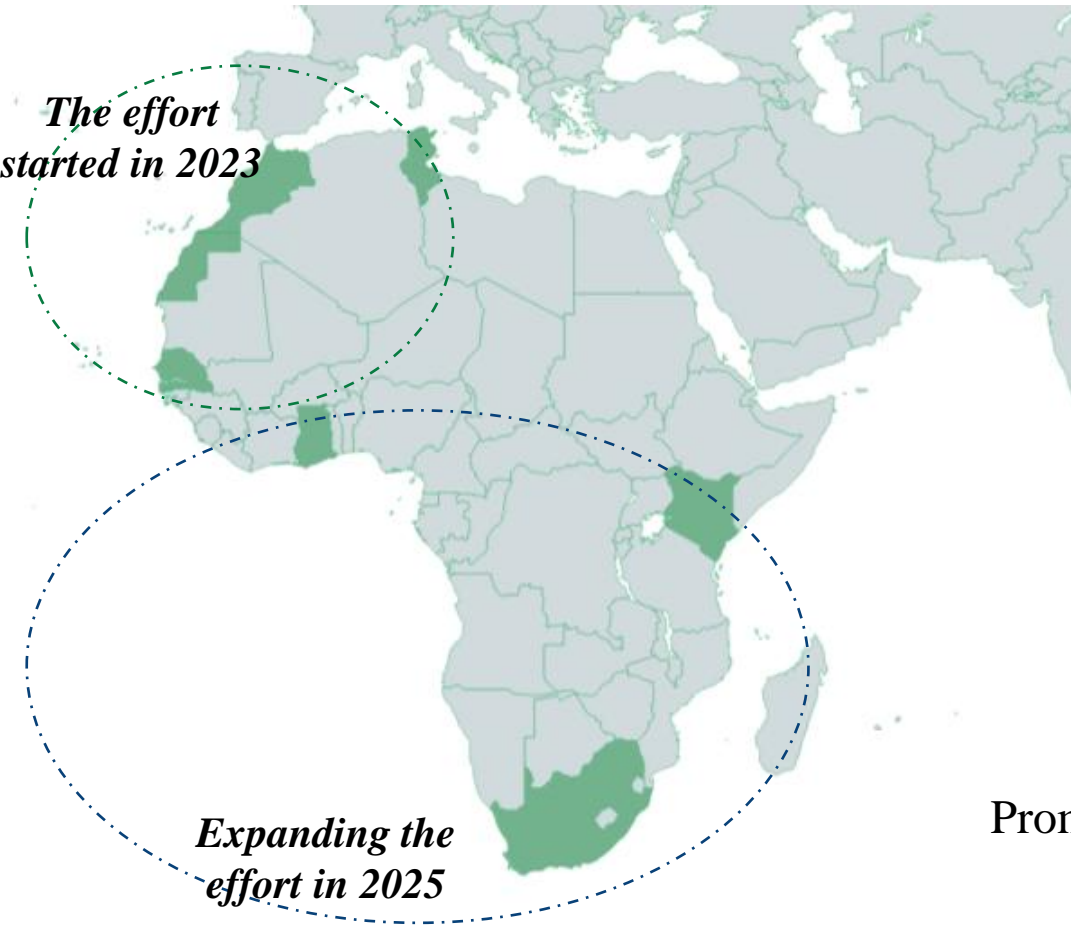




# International Rendering Symposium African Market Opportunities Overview

30 January, 2025

# NARA Initiatives in Africa



**Building positive stakeholder engagement with the local industry**



**Access to Market**  
Opportunity to be first in the market



**Business Development**

Promoting US rendered products



**Advocacy Efforts**

Targeting public and private stakeholders

**Existing Markets:** South Africa, Ghana, and Kenya trade rendered products—growth potential exists.

**Industry Support:** Livestock, aquaculture, and poultry sectors are open to inclusion but lack technical know-how.

**Regulatory Hurdles:** BSE legacy bans remain; lifting them requires sustained advocacy.

## Activities

1. **Market Study:** Completed in 2024 under the EMP Program.
2. **Stakeholder Engagement:** Ongoing dialogue to promote U.S.-rendered products.
3. **Business Development:** Connecting local industry with NARA members (e.g., July 2024 networking sessions).
4. **Advocacy:** Promoting U.S.-rendered products to stakeholders.
5. **Awareness:** Highlighting the rendering industry (e.g., July 2024 workshop).



## Achievements

1. **Regulatory Progress:** Until March 2024, Morocco prohibited animal by-products in pet food. On March 29, 2024, ONSSA published a procedural code allowing their import for dog and cat food.
2. **Industry Updates:** Influencers in the feed sector confirmed ongoing government efforts to update regulations on animal by-products in feed.
3. **Landmark Collaboration:** In December 2025, NARA and AFAC signed an MOU at Dawajine, Morocco's largest poultry trade show.



## Next Steps

1. Working with APHIS on having Pet Food Export Certificate between APHIS and ONSSA to support rendered products import for Animal feed.
2. Continuing the business development efforts in the country to promote US rendered products. Country meetings planned in February, 2025

# Morocco Pet Food Imports

44%

of people in Morocco own pet

23%

of people in Morocco own dog as their pet

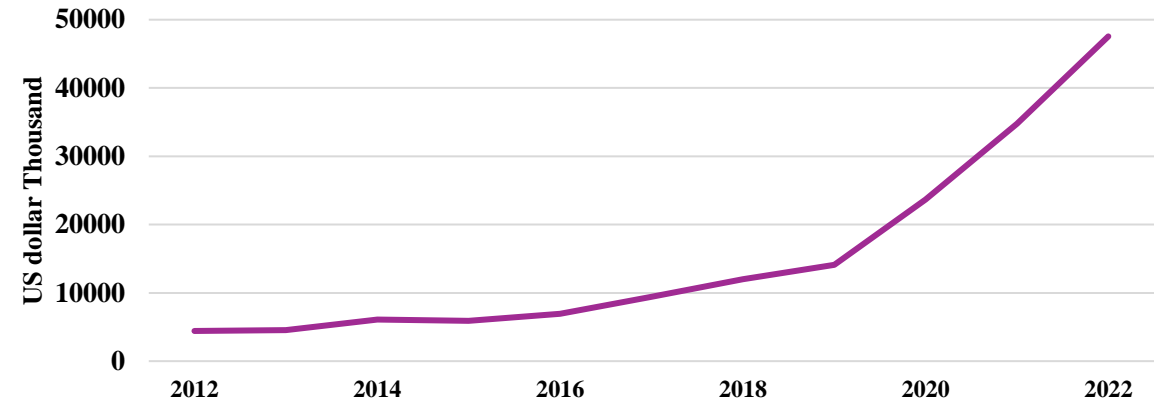
78%

of people in Morocco own cat as their pet

4%

of people in Morocco own fish as their pet

*Historical data of the importation of pet food into Morocco from the past 10 years*



Source: ITC, Visualized by LixCap

- Local Production Growth:** Pet food lines are being established, driving demand for local manufacturing to realize import substitution
- Skills Gap:** Formulation and production expertise are needed.
- Market Access:** Rendered products are allowed for pet food applications.

*Moroccan brands of pet food*



# Morocco: Rendered Products Imports

## Rendered Products Import Quantities in Tons (2023)

Exporter	Animal Fats and Oils (Tons)	BM (Tons)	Edible & Inedible Tallow (Tons)	Gel Bone (Tons)	Pork Fat, White Grease, Yellow Grease (Tons)	Poultry Fat (Tons)	Rank	% of Total
France	0	124	2	0	61	56	1	31.6%
Belgium	0	110	0	0	0	0	2	14.4%
Germany	0	89	0	1	0	0	3	11.7%
Turkey	0	45	0	0	0	0	4	5.9%
Argentina	0	36	0	0	0	0	5	4.8%
Spain	0	2	2,000	85	10	0	6	27.2%
Brazil	0	2	0	0	0	0	7	0.3%
United Kingdom	0	0	0	0	0	0	8	0.01%
China	0	0	0	0	0	0	9	0.006%
<b>Total</b>	0	408	2002	85	71	56		100%

Source: ITC, visualized by LixCap

## Activities

1. **Market Study:** Completed in 2024 under the EMP Program.
2. **Stakeholder Engagement:** Ongoing dialogue to promote U.S.-rendered products.
3. **Business Development:** Connecting local industry with NARA members (e.g., July 2024 networking sessions, Tunisian Industry joining the WRO).
4. **Advocacy:** Promoting U.S.-rendered products to stakeholders.
5. **Awareness:** Highlighting the rendering industry (e.g., July 2024 workshop).



## Achievements

1. **Industry Updates:** Tunisian second player in poultry production is committed to launch the rendering facility. Already, producing pet food.
2. **Landmark Collaboration:** Due to the continuous engagement with the stakeholders in the country, the industry's interest in investing in the rendering sector and are working to improve the production quality of the pet food products that are produced locally originating
3. **In country representation:** Setting up the engagement of the local representative.



## Next Steps

1. Since it is possible to import the rendered products for pet food production, the team will be working with APHIS on having **Pet Food Export Certificate** between APHIS and INSSA to support rendered products import for Animal feed.
2. Continuing the business development efforts in the country to promote US rendered products. Country meetings planned in February, 2025

# Tunisia: Rendered Products Imports

## Rendered Products Import Quantities in Tons (2023)

Exporter	Blood Meal (Tons)	Pork Fat, White Grease, Yellow Grease (Tons)	Rank	% of Total
<b>Argentina</b>	0	26	<b>1</b>	74.86%
<b>France</b>	0	3	<b>2</b>	9.16%
<b>Germany</b>	0	3	<b>3</b>	9.01%
<b>Brazil</b>	0	1	<b>4</b>	2.88%
<b>Spain</b>	0	1	<b>5</b>	2.19%
<b>Total</b>	0	34		100%

## Activities

1. **Market Study:** Completed in 2024 under the EMP Program.
2. **Stakeholder Engagement:** Ongoing dialogue to promote U.S.-rendered products.
3. **Business Development:** Connecting local industry with NARA members (e.g., July 2024 networking sessions).
4. **Advocacy:** Promoting U.S.-rendered products to stakeholders.
5. **Awareness:** Highlighting the rendering industry (e.g., July 2024 workshop).



## Achievements

1. **Industry Updates:** Before NARA's outreach, Senegalese businesses had little to no knowledge about the rendering sector. However, through persistent efforts and a workshop introducing the industry in Morocco, key stakeholders gained a deeper understanding and expressed interest in the rendered products, particularly for the poultry and aquaculture feed.
2. **In country representation:** Setting up the engagement of the local representative.

## Next Steps

1. We are working with the poultry association for rendered product inclusion and have already conducted training and workshop with the leading feed mills in Senegal and a soft approach with regulator.
2. Continuing the business development efforts in the country to promote US rendered products. Country meetings planned in February, 2025



# Senegal: Rendered Products Imports

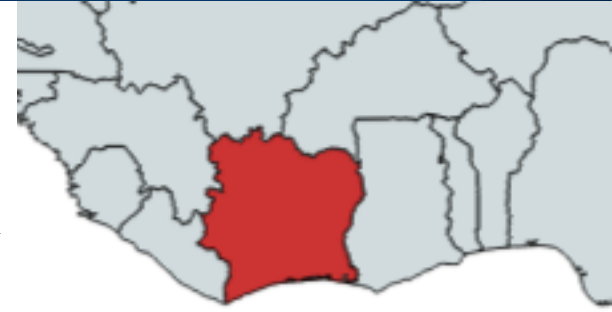
## Rendered Products Import Quantities in Tons (2023)

Exporter	Animal Fats and Oils (Tons)	Blood Meal (Tons)	Edible & Inedible Tallow (Tons)	Pork Fat, White Grease, Yellow Grease (Tons)	Poultry Fat (Tons)	Rank	% of Total
<b>China</b>	0	3	0	0	0	<b>1</b>	61.86%
<b>France</b>	0.1	0	0	0	0.7	<b>2</b>	20.82%
<b>Spain</b>	0	1	0	0	0	<b>3</b>	17.32%
<b>Total</b>	0.1	4	0	0	0.7		100%

# Ivory Coast- New Market to Target

## Activities

1. **Rapid Market Assessment** is started
2. **Stakeholder Engagement:** Ongoing dialogue to promote U.S.-rendered products.
3. **Business Development:** Connecting local industry with NARA members.
4. **Advocacy:** Promoting U.S.-rendered products to stakeholders.
5. **Awareness:** Highlighting the rendering industry (e.g., July 2024 workshop).
6. **In country representation:** Local representative identified, and starting to set up the engagement with stakeholders.



## Rendering Operations

Rendered Product Inclusion in animal feed is authorized, local companies however are not familiar with the industry. Imports of rendered products are also authorized but on a case-to-case basis.

## Key Stakeholder

1. Cote d'Ivoire Livestock and Meat Interprofessional association
2. Department of Animal Health
3. Ivory Coast- Chambre of Commerce

## Next Steps

1. We have met with all major feedmills and one has used MBM in the past
2. A company tried to import feather meal without success
3. It is possible to import rendered products, but each shipment requires an approval, and the regulator stated "we do not know how to regulate, so we do not approve".

# Ivory Coast: Rendered Products Imports

## Rendered Products Import Quantities in Tons (2023)

Exporter	Animal Fats and Oils (Tons)	Blood Meal (Tons)	Edible & Inedible Tallow (Tons)	Feather Meal (Tons)	Gel Bone (Tons)	MBM, Poultry Meal, Porcine Meal (Tons)	Pork Fat, White Grease, Yellow Grease (Tons)	Rank	% of Total
<b>Brazil</b>	0	0	0	0	0	0	208	<b>1</b>	87.53%
<b>Germany</b>	0	0	0	0	0	0	17	<b>2</b>	6.93%
<b>France</b>	0	0	0	0	9	0.3	0.2	<b>3</b>	4.03%
<b>China</b>	0	0	0	0	0	0	3	<b>4</b>	1.27%
<b>Belgium</b>	0	0	0	0	0	0	0.5	<b>5</b>	0.21%
<b>Total</b>	0	0	0	0	9	0.3	228.7		100%

# Kenya- New Market to Target

## Regulatory Framework

**Fertilizers and Animal Foodstuffs Act<sup>1</sup> (2012)**

## Key Public Stakeholders

1. Kenya Bureau of Standards (**KEBS**)
2. Directorate of Veterinary Services (**DVS**)

## Rendering Operations

1. Emerging rendering industry
2. Recent collaborations with (**Brazilian Renderers Association -ABRA**) aiming to develop the sector
3. Growing interest in establishing partnerships and expanding rendering operations

## Industry Associations

1. Kenya Feed Manufacturers Association (**KEFEMA**)
2. Kenya Poultry Farmers Association (**KEPOFA**)

## Main Takeaways

1. Market protected with limitations on import potential as imports of rendered products require case-by-case approval.
2. Meat and Bone Meal trade value: **USD 200-300K (2023)**



# Kenya: Rendered Products Imports

## Rendered Products Import Quantities in Tons (2023)

Exporter	Animal Fats and Oils (Tons)	Blood Meal (Tons)	Feather Meal (Tons)	MBM, Poultry Meal, Porcine Meal (Tons)	Pork Fat, White Grease, Yellow Grease (Tons)	Rank	% of Total
<b>China</b>	0	0	0	21.5	65.5	<b>1</b>	73.63%
<b>Netherlands</b>	0	0	0	0	29	<b>2</b>	24.32%
<b>United States</b>	0	0	0	0	2	<b>3</b>	1.72%
<b>Brazil</b>	0	0	0	0	0	<b>4</b>	0.17%
<b>United Kingdom</b>	0	0	0	0	0	<b>5</b>	0.10%
<b>Total</b>	0	0	0	21.5	86.5		100%

Source: ITC , Visualize dby LixCap

# Ghana- New Market to Target

## Regulatory Framework

1. **National Food Safety Policy<sup>1</sup>**
2. **Meat Inspection Regulations (2020)**

## Key Public stakeholders

1. **Veterinary Services Directorate (VSD)**
2. **Food and Drugs Authority (FDA)**

## rendering operations

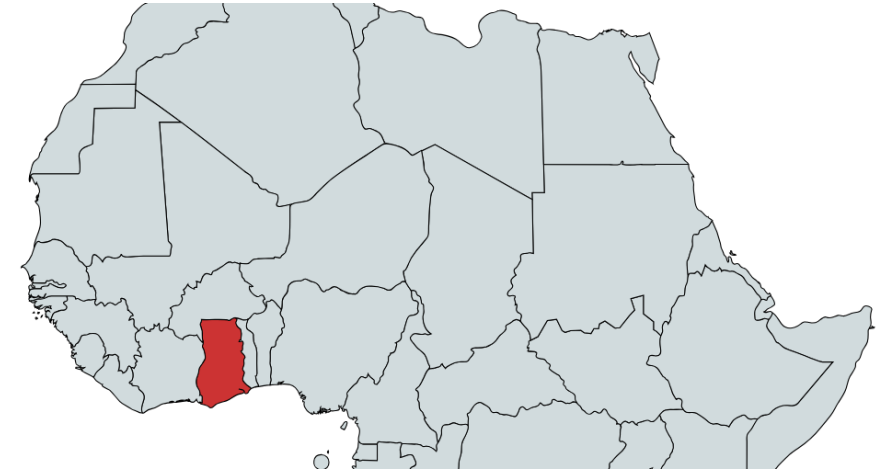
1. Underdeveloped rendering sector.
2. No specific rendering legislation is established, however, Ghana's regulations ensure standards in animal production and food safety.

## Industry associations

1. **Ghana National Association of Poultry Farmers (GNAPF)**

## Main takeaways

1. Important African poultry importer with current Poultry sector development.
2. Open market to US imports of some rendered products.
3. Extremely price sensitive market
4. Halal certification is not a limiting factor for the Ghana market.
5. Meat and Bone Meal trade value: **1 to 1.5 Million USD (2023)**.



# Ghana Rendered: Products Imports

## Rendered Products Import Quantities in Tons (2023)

Exporter	Animal Fats and Oils (Tons)	Feather Meal (Tons)	Gel Bone (Tons)	Lard (Tons)	MBM, Poultry Meal, Porcine Meal (Tons)	Pork Fat, White Grease, Yellow Grease (Tons)	Rank	% of Total
<b>United States</b>	0.4	0	0	0	134	6	1	47.05%
<b>Belgium</b>	0	0.2	0	0	83.5	3	2	29.22%
<b>Germany</b>	0	0	0	0	37	1.5	3	12.88%
<b>China</b>	0	0	1	0	0	21	4	7.32%
<b>United Kingdom</b>	0	0	0	0	0	8.5	5	2.81%
<b>Total</b>	0.4	0.2	1	0	254.5	40		100%

Source: ITC trade map

## Regulatory Framework

### Fertilizers, Farm Feeds, Agricultural Remedies Act<sup>1</sup>

## Key public Stakeholders

- Department of Agriculture, Land Reform, and Rural Development (**DALRRD**)
- South African Bureau of Standards (**SABS**)

## Rendering Operations

- Strong pet food industry in Africa
- Regulations allow for rendering operation.
- Imported rendered products require a veterinary import permit.

## Industry Associations

South African Poultry Association (**SAPA**)

## Main Takeaways

1. Largest market in Southern Africa
2. Substantial Pet Food Business and local rendering
3. Close to non-existent US-imports market share
4. Meat and Bone Meal trade value: **USD 37 Million (2023)**





# South Africa: Rendered Products Imports

## Rendered Products Import Quantities in Tons (2023)

Country	Gel Bone	Poultry Fat	Tallow	Animal Fats & Oils	Yellow Grease	Feather Meal	MBM / Poultry / Porcine	Blood Meal	Rank
<b>Brazil</b>	0	0	0	0	0	0	14,491	0	<b>1</b>
<b>Netherlands</b>	0	0	0	0	17	0	11,359	32	<b>2</b>
<b>United Kingdom</b>	0	0	0	0	13	0	7,257	0	<b>3</b>
<b>Denmark</b>	0	0	0	0	0	0	8,569	5	<b>4</b>
<b>Spain</b>	0	500	0	0	0	0	3,809	0	<b>5</b>
<b>France</b>	0	576	0	0	0	0	1,372	0	<b>6</b>
<b>Argentina</b>	0	0	0	0	0	0	1,864	0	<b>7</b>
<b>Germany</b>	0	0	0	0	30	0	1,503	1	<b>8</b>
<b>Türkiye</b>	0	0	0	0	434	0	0	0	<b>9</b>
<b>Belgium</b>	0	0	0	0	437	0	0	0	<b>10</b>
<b>Paraguay</b>	0	0	0	0	0	0	1,324	0	<b>11</b>
<b>Australia</b>	0	0	0	0	38	0	485	0	<b>12</b>
<b>Botswana</b>	1	0	0	0	208	0	740	0	<b>13</b>
<b>Namibia</b>	72	0	152	0	0	0	357	0	<b>14</b>
<b>Mozambique</b>	14	0	0	0	28	0	0	0	<b>15</b>
<b>United States of America</b>	0	0	0	0	101	0	0	10	<b>16</b>
<b>Total</b>	87	1,077	152	0	1,306	0	53,130	48	

# APHIS VS Form 16-4 Agreements Overview

Country	Description
<b>South Africa</b>	<ol style="list-style-type: none"> <li>1. Since Nov 2024, South Africa no longer accepts APHIS VS Form 16-4 for animal product exports.</li> <li>2. Certificates must be issued on USDA APHIS letterhead.</li> </ol>
<b>Tunisia</b>	<ol style="list-style-type: none"> <li>1. An APHIS VS Form 16-4 agreement for the following products:               <ol style="list-style-type: none"> <li>1. Treated Hides</li> <li>2. Skins of Ungulates</li> </ol> </li> </ol>
<b>Morocco, Senegal, Cote d'Ivoire, Ghana, Kenya</b>	<ol style="list-style-type: none"> <li>1. No APHIS VS Form 16-4 agreements with Morocco, Senegal, Kenya, Côte d'Ivoire, or Ghana.</li> <li>2. Export requirements and certifications differ by country.</li> </ol>

Source: USDA Animal and Plant Health Inspection Service

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Thank you!